
NCQA PCMH 2014 Documentation Checklist

PCMH 4B MUST PASS

PCMH 4B Factor 1 Must Pass Critical Factor Corporate Survey

The care team and patient/family/caregiver collaborate (at relevant visits) to develop and update an individual care plan that includes the following features for at least 75 percent of the patients identified in 4A:

Incorporates patient preferences and functional/lifestyle goals

PCMH 4B Factor 2 Must Pass Critical Factor Corporate Survey

The care team and patient/family/caregiver collaborate (at relevant visits) to develop and update an individual care plan that includes the following features for at least 75 percent of the patients identified in 4A:

Identifies treatment goals

PCMH 4B Factor 3 Must Pass Critical Factor Corporate Survey

The care team and patient/family/caregiver collaborate (at relevant visits) to develop and update an individual care plan that includes the following features for at least 75 percent of the patients identified in 4A:

Assesses and addresses potential barriers to meetings goals

PCMH 4B Factor 4 Must Pass Critical Factor Corporate Survey

The care team and patient/family/caregiver collaborate (at relevant visits) to develop and update an individual care plan that includes the following features for at least 75 percent of the patients identified in 4A:

Includes a self-management plan

PCMH 4B Factor 5 Must Pass Critical Factor Corporate Survey

The care team and patient/family/caregiver collaborate (at relevant visits) to develop and update an individual care plan that includes the following features for at least 75 percent of the patients identified in 4A:

Is provided in writing to the patient/family/caregiver

Documentation Required

Report OR Record Review Workbook

Screen Shots, i.e., electronic “copy” may be used as 1) examples (system capabilities of an electronic health record—EHR) 2) materials (Web site resources) 3) reports (logs, patient lists) or 4) records (e.g. documentation of clinical advice in the medical record)

Report

Aggregated data showing evidence

Stage 2 Core Meaningful Use Requirement

Does the Report include the following?

Practice Name

De-identified PHI

Reporting period current, within the past 12 months

Correct time frame (at least 3 months)

Report is not future dated

Displays numerator, denominator, and percent

Text boxes, arrows, or other methods identify important headers/sections

Text boxes, arrows, or other methods briefly explain the importance to the elements

Does this documentation meet the intent of the factor?

Yes No

If no, suggestions to meet the intent